

Investment Application Forms

Updated August 17, 2010

	Form #	Last Update
BMO Insurance		
Single Premium Immediate Annuity (SPIA) Application	348E	(04/2009)
Canada Life		
Generations Generations I - Application for Retirement Savings and Non-Registered Accounts	148 CAN	(09/2008)
Generations Generations I - Application for RIF, LIF and LRIF Accounts	147 CAN	(09/2008)
Generations Generations I - Information Folder (now includes Summary Fact Statements)	143 CAN	(07/2009)
Generations Generations I - Individual Variable Insurance Contract	144 CAN	(04/2008)
Estate Protection Application for Non-registered Funds	46-7168	(09/2008)
Estate Protection Information Folder	46-7163	(05/2009)
Estate Protection Contract	46-7164	(09/2008)
Canada Life Segregated Fund Application for TFSA	46-7305	(05/2010)
Canada Life Segregated Fund Application for RRSP, Non-Registered	46-7135	(03/2010)
Canada Life Segregated Fund Application for RRIF, LIF, LRIF	46-5714	(10/2009)
Canada Life Segregated Fund Information Folder	46-7136	(10/2009)
Canada Life Segregated Fund Contract	46-7134	(10/2009)
SPIA – Application for a Single Premium Annuity Policy – Registered and Non-Registered	188 CAN	(07/2006)
Empire Life		
Elite or Elite XL Investment Program Application	INP-0165	(05/2008)
TFSA Elite or Elite XL Application	INP-0278	(01/2009)
Elite or Elite XL Investment Program Information Folder + Addendum	INP-0260	(12/2008)
Empire Class Application	INP-0154	(01/2010)
TFSA Empire Class Application	INP-0279	(01/2010)
Empire Class Information Folder + Addendum	INP-0176	(01/2010)
Segregated Fund Highlights	INP-0099	(04/2009)

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Equitable Life

Pivotal Solutions & Pivotal Solutions DCS – Application	1377	(01/2010)
TFSA Pivotal Solutions & Pivotal Solutions DSC TFSA – Application	796	(01/2010)
Pivotal Solutions & Pivotal Solutions DCS – Contract	1379	(10/2008)
Pivotal Solutions & Pivotal Solutions DCS – RI/LIF Application	1378	(03/2010)
Pivotal Solutions & Pivotal Solutions DCS – RI/LIF Contract	1380	(10/2008)
Pivotal Solutions & Pivotal Solutions DCS – Information Folder	1381	(11/2009)
TFSA Guaranteed Interest Accounts TFSA Application	1382	(01/2010)
Immediate Annuity Application	355	(01/2010)

IAP

My Education – Individual Education Savings Plan Application	F23AP	(09/2008)
My Education – Family Education Savings Plan Application	F28AP	(02/2010)
Ecoflex – Investment Funds Application for an Education Savings Plan	F24AP	(07/2009)
Ecoflex / Ecoflextra - Application	F17AP	(02/2010)
TFSA Ecoflex /Ecoflextra Application	F17 -1AP	(10/2008)
Ecoflex Investment Funds – Information Folder	F13-282AP	(10/2009)
Ecoflex - Summary fact Statement and Financial Highlights	F13-526AP	(01/2010)
Ecoflextra - Information Folder and Individual Contract	F13-681AP	(10/2009)
Ecoflextra - Summary fact Statement and Financial Highlights	F13-680AP	(01/2010)
Diploma Individual Education Savings Plan Application	F25AP	(12/2008)
Diploma Fund Application	F26AP	(07/2010)
Diploma Information folder	F13-443A	(06/2010)
TFSA High-Interest Tax Free Savings Account Application	F17AP(2)	(11/2009)

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Manulife Financial		
Manulife GIF Select Application for Non-Reg, RSP, LIRA, LRSP	NN0821E	(10/2009)
Manulife GIF Select Application for RIF, LIF, LRIF, PRIF	NN0891E	(10/2009)
TFSA Application for GIF Select InvestmentPlus	NN1565	(10/2009)
GIF Select (Base) InvestmentPlus Informaton Folder and Contract	MK2278	(10/2009)
GIF Select EstatePlus Information Folder and Contract supplement	MK2279	(10/2009)
GIF Select IncomePlus Version 2 Information Folder and Contract supplement	MK2280	(10/2009)
GIF Select Fund Highlights	MK2343	(04/2010)
GIC Application Guaranteed Interest Contract	NN0978	(12/2009)
TFSA GIC Application Guaranteed Interest Contract	NN1566	(12/2009)
Application for Annuity	NN0486E	(06/2010)
RBC Insurance		
RBC GIF Application for Registered and Non-Registered Contracts	83146	(11/2009)
RBC GIF Information Folder and Contract	89818	(11/2009)
RBC GIF Funds Highlights	89820	(10/2008)
TFSA RBC GIF Application for Tax-free Savings Account	83124	(01/2009)

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Standard Life

Ideal - Application for an Ideal Segregated Fund Policy	4295	(05/2009)
Ideal Segregated Fund Information Folder	4292	(05/2009)
TFSA Ideal Segregated Fund Application	6461	(11/2008)
Ideal - Segregated Funds Signature Series Application	6415	(09/2009)
TFSA Ideal Segregated Funds Signature Series Application	6463	(10/2009)
Ideal Segregated Funds Signature Series Information Folder	6414	(10/2009)
Ideal - Application for an Ideal Term Fund Policy	5381	(01/2010)
TFSA Ideal Term Fund Application	6462	(01/2010)
Application for your Annuity – Registered as an RSP or a Non-Registered Annuity	3058	(11/2008)

Transamerica Life

Transamerica GIF Application	IP1299	(10/2009)
Transamerica GIF Information Folder	IP1300	(10/2009)
Transamerica GIF Fund Highlights	IP1301	(10/2009)
TFSA Transamerica GIF Application	IP1302	(10/2009)
Five for Life Application form	IP1172	(10/2009)
Five for Life Information Folder	IP1176	(10/2009)
Five for Life Summary Fact Statements	IP1175	(10/2009)
SPIA – Application for a Single Premium Immediate Annuity Policy	IP-NB151	(06/2009)